



# **FI\$Cal**

*Financial Information System for California*

## **Wave 2 – User Acceptance Testing (UAT) Scenario Workshop – Purchasing, eProcurement (PO)**

February 17, 2015

# Agenda

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- Purpose and Expected Outcome
- Review BUSN242 Response Template
- Wave 1 UAT Scenarios
  - Functionality Introduction
  - Review Related UAT Scenarios
  - Collect Additional UAT Scenarios
- Wave 2 UAT Scenarios
  - Functionality Introduction
  - Review Related UAT Scenarios
  - Collect Additional UAT Scenarios
- Next Steps

# Purpose and Expected Outcome

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- Purpose:

- ☐ The Purpose of this Workshop is to review the testing scenarios planned for Wave 2 User Acceptance Testing (UAT) – this is part of BUSN242. Our goal is to solicit additional testing scenarios from departments to ensure we have adequately covered the complete business process for each area.

- Expected Outcome:

- ☐ Conduct workshops and capture feedback for additional departmental UAT Scenarios.

# Review BUSN242 Response Template

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- Open Response Template on Desktop

# Wave 2 UAT Scenarios – Process Areas

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- ePro3 – Create and Approve Requisitions
- ePro 1 – Manage Solicitation
- ePro 2 – Administer Vendor Contract
- PO2 – Manage Purchase Orders
- PO4 – Process Procurement Card Transactions
- PO3 - Receive and Inspect Goods and Services
- SB/DVBE Certification
- PO1 – Maintain Items for Purchase
- SCPRS, CSCR, and Progress Payments

# Wave 2 UAT Scenarios

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Business Process	UAT Scenario	Brief Description
ePro3 - Create and Approve Requisitions	Create and Approve Requisition by Description and above PA (IT Service)	Create and Approve Requisition created for Service.
ePro3 - Create and Approve Requisitions	Manage Requisition (Update, Cancel, Re-Open)	Update, Cancel and Re-Open Requisition.
ePro3 - Create and Approve Requisitions	Inquiries and Reports	Run Requisition Reports.
ePro3 - Create and Approve Requisitions	Requisition Approvals (Approve, Deny, On Hold, Push back)	Requisition Approval.

# Wave 2 UAT Scenarios

Business Process	UAT Scenario	Brief Description
ePro3 - Create and Approve Requisitions	Update Purchasing Authority and Submit and Approve at Department level (After final Department Approval, it will flow to DGS for approval)	Update Purchasing Authority and Approve the Purchasing Authority.
ePro3 - Create and Approve Requisitions	Update PAC/PCO and Submit and Approve at Department level (After final Department Approval, it will flow to DGS for approval)	Update PAC/PCO.
ePro3 - Create and Approve Requisitions	DGS PA and PAC/PCO Approve and Deny, Update Department PA, add Exemption Code	DGS Purchasing Authority and PAC/PCO Approval.

# Wave 2 UAT Scenarios

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- Collect Additional UAT Scenarios
  - Open dialogue to solicit additional UAT Scenarios for usage during UAT:
    - *ePro3 – Create and Approve Requisitions*

# Wave 2 UAT Scenarios

Business Process	UAT Scenario	Brief Description
ePro1 - Manage Solicitation	Create Online Buy Solicitation Event above PA, with Exemption Code (Public and also invite Bidder)	Create Online Buy Solicitation Event above PA, with Exemption Code (Public and also invite Bidder).
ePro1 - Manage Solicitation	Create Online RFI, include Bid Factor creation (Private Event)	Create Online RFI, include Bid Factor creation (Private Event).
ePro1 - Manage Solicitation	Create Buy Solicitation Event from Requisition, Two Envelope, with Intent to Award (Public)	Create Buy Solicitation Event from Requisition, Two Envelope, with Intent to Award (Public).
ePro1 - Manage Solicitation	Award Solicitation Event to PO and Contract	Award Solicitation Event to PO and Contract.
ePro1 - Manage Solicitation	Collaborate, Post and Approve Solicitation Event	Collaborate, Post and Approve Solicitation Event.

# Wave 2 UAT Scenarios

Business Process	UAT Scenario	Brief Description
ePro1 - Manage Solicitation	Create Bidder Profile on Behalf of Bidder and Enter Bid Response on Behalf of Bidder	Create Bidder Profile on Behalf of Bidder and Enter Bid Response on Behalf of Bidder.
ePro1 - Manage Solicitation	Analyze with Collaboration	Analyze with Collaboration.
ePro1 - Manage Solicitation	Analyze without Collaboration (Export and Import Analysis)	Analyze without Collaboration (Export and Import Analysis).
ePro1 - Manage Solicitation	Award Solicitation to multiple Vendor / Bidder	Award Solicitation to multiple Vendor / Bidder.
ePro1 - Manage Solicitation	Inquiries and Reports	Inquiries and Reports.
ePro1 - Manage Solicitation	Create a new Version with Amendment and QA document attached	Create a new Version with Amendment and QA document attached.

# Wave 2 UAT Scenarios

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- Collect Additional UAT Scenarios
  - Open dialogue to solicit additional UAT Scenarios for usage during UAT:
    - *ePro 1 – Manage Solicitation*

# Wave 2 UAT Scenarios

Business Process	UAT Scenario	Brief Description
ePro2 - Administer Vendor Contract	Create a Multi-Year Contract with multi-line, Above PA, Open Item, Item Category, Item Description, Add Contract Document	Create a Multi-Year Contract with multi-line, Above PA, Open Item, Item Category, Item Description, Add Contract Document.
ePro2 - Administer Vendor Contract	Copy Contract and Update, within PA, Add Agreement Summary and Sub Contracting Information	Copy Contract and Update, within PA, Add Agreement Summary and Sub Contracting Information.
ePro2 - Administer Vendor Contract	Approve Contract and Ad Hoc OLS Approver	Approve Contract and Ad Hoc OLS Approver.
ePro2 - Administer Vendor Contract	Dispatch Contract	Dispatch Contract.

# Wave 2 UAT Scenarios

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Business Process	UAT Scenario	Brief Description
ePro2 - Administer Vendor Contract	Add Contract Document	Add Contract Document.
ePro2 - Administer Vendor Contract	Create Contract PO Release	Create Contract PO Release.
ePro2 - Administer Vendor Contract	Contract Change Order	Contract Change Order.
ePro2 - Administer Vendor Contract	Inquiries and Report	Inquiries and Report.

# Wave 2 UAT Scenarios

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- Collect Additional UAT Scenarios
  - Open dialogue to solicit additional UAT Scenarios for usage during UAT:
    - *ePro 2 – Administer Vendor Contract*

# Wave 2 UAT Scenarios

Business Process	UAT Scenario	Brief Description
PO2 - Manage Purchase Orders	Create Online PO without SABRC with Sub Contracting information within PA (Service + Goods - 2 lines)	Create Online PO without SABRC with Sub Contracting information within PA (Service + Goods - 2 lines).
PO2 - Manage Purchase Orders	Create a PO from Requisition with SABRC and above PA (Goods - Single Line)	Create a PO from Requisition with SABRC and above PA (Goods - Single Line).
PO2 - Manage Purchase Orders	Create PO from Contract, Split Schedule, Split Distribution	Create PO from Contract, Split Schedule, Split Distribution.
PO2 - Manage Purchase Orders	Create PO Change Order, Update PO without Change Order	Create PO Change Order, Update PO without Change Order.
PO2 - Manage Purchase Orders	PO Reconciliation, Cancel, Re-open	PO Reconciliation, Cancel, Re-open.

# Wave 2 UAT Scenarios

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Business Process	UAT Scenario	Brief Description
PO2 - Manage Purchase Orders	Approve, Budget Check, Dispatch PO (Fax, Email, Print)	Approve, Budget Check, Dispatch PO (Fax, Email, Print).
PO2 - Manage Purchase Orders	Inquiries and Reports	Inquiries and Reports.

# Wave 2 UAT Scenarios

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- Collect Additional UAT Scenarios
  - Open dialogue to solicit additional UAT Scenarios for usage during UAT:
    - *PO2 – Manage Purchase Orders*

# Wave 2 UAT Scenarios

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Business Process	UAT Scenario	Brief Description
PO4 - Process Procurement Card Transactions	P-Card Reconciliation	P-Card Reconciliation.
PO4 - Process Procurement Card Transactions	P-Card Reports	P-Card Reports.
PO4 - Process Procurement Card Transactions	Administer P-Card	Administer P-Card.

# Wave 2 UAT Scenarios

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- Collect Additional UAT Scenarios
  - Open dialogue to solicit additional UAT Scenarios for usage during UAT:
    - *PO4 – Process Procurement Card Transactions*

# Wave 2 UAT Scenarios

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Business Process	UAT Scenario	Brief Description
PO3 - Receive and Inspect Goods and Services	Receive Goods	Receive Goods.
PO3 - Receive and Inspect Goods and Services	Receive Services	Receive Services.
PO3 - Receive and Inspect Goods and Services	Cancel Receipt	Cancel Receipt.
PO3 - Receive and Inspect Goods and Services	RTV Transaction	RTV Transaction.

# Wave 2 UAT Scenarios

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Business Process	UAT Scenario	Brief Description
PO3 - Receive and Inspect Goods and Services	Receipt Inspection	Receipt Inspection.
PO3 - Receive and Inspect Goods and Services	Run Receiving Reports	Run Receiving Reports.

# Wave 2 UAT Scenarios

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- Collect Additional UAT Scenarios
  - Open dialogue to solicit additional UAT Scenarios for usage during UAT:
    - *PO3 - Receive and Inspect Goods and Services*

# Next Steps

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- Provide any additional UAT Scenarios (BUSN242) prior to due date.
- Review and Complete the PO Scenarios as part of the BUSN242 Response Template due **Friday, February 27, 2015.**

# Wave 2 UAT Scenarios – DGS

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- SB/DVBE Certification
- PO1 – Maintain Items for Purchase

# Wave 2 UAT Scenarios – DGS

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## SB/DVBE Certification

- The SB and DVBE Certification Program will be managed by DGS-OSDS in FI\$Cal.
- DGS-OSDS is responsible for approving or denying certification applications.
- All firms that would like to apply for certification will need online credentials by registering as a Bidder or as an eSupplier (for firms already in the FI\$Cal vendor file).

# Wave 2 UAT Scenarios – DGS

Business Process	UAT Scenario	Brief Description
PO2 - Manage Purchase Orders	<b>DGS Control Only:</b> Online Apply for SB and DVBE Certification	DGS Only: Online Apply for SB and DVBE Certification.
PO2 - Manage Purchase Orders	<b>DGS Control Only:</b> Paper based SB and DVBE Certification	DGS Only: Paper based SB and DVBE Certification.
PO2 - Manage Purchase Orders	<b>DGS Control Only:</b> Manage Certification	DGS Only: Manage Certification.
PO2 - Manage Purchase Orders	<b>DGS Control Only:</b> Edit and Approve Certification	DGS Only: Edit and Approve Certification.
PO2 - Manage Purchase Orders	<b>DGS Control Only:</b> Certification Reports	DGS Only: Certification Reports.
PO1 - Maintain Items	<b>DGS Control Only:</b> Item Upload (Only Cal PIA and DGS)	Item Upload (Only Cal PIA and DGS).

# Wave 2 UAT Scenarios – DGS

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- Collect Additional UAT Scenarios
  - Open dialogue to solicit additional UAT Scenarios for usage during UAT:
    - *SB/DVBE Certification*
    - *Maintain Items for Purchase*

# Wave 2 UAT Scenarios – Future Wave, Deferred and Exempt Departments

Business Process	UAT Scenario	Brief Description
PO2 - Manage Purchase Orders	Non-Wave 2: Online SCPRS Entry and Update SCPRS entry	Non-Wave 2: Online SCPRS Entry and Update SCPRS entry.
PO2 - Manage Purchase Orders	Non-Wave 2: SCPRS Upload	Non-Wave 2: SCPRS Upload.
ePro1 - Manage Solicitation	Non Wave 2: Online CSCR Entry and Approval	Non Wave 2: Online CSCR Entry and Approval.
ePro1 - Manage Solicitation	Non Wave 2: Progress Payment	Non Wave 2: Progress Payment.

# Wave 2 UAT Scenarios

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- Collect Additional UAT Scenarios
  - Open dialogue to solicit additional UAT Scenarios for usage during UAT:
    - SCPRS
    - CSCR
    - *Progress Payment*

# Next Steps

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- Provide any additional UAT Scenarios (BUSN242) prior to due date.
- Review and Complete the PO Scenarios as part of the BUSN242 Response Template due **Friday, February 27, 2015.**

# Question and Answer

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FI\$Cal Project Information:

<http://www.fiscal.ca.gov/>

or e-mail the FI\$Cal Project Team at:

[fiscal.cmo@fiscal.ca.gov](mailto:fiscal.cmo@fiscal.ca.gov)

# APPENDIX

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# Wave 2 Demo– PO Creation

[Main Menu](#) > [eProcurement](#) > [Buyer Center](#) > [Manage Purchase Orders](#) > [Add/Update POs](#)

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**FI\$Cal**

Maintain Purchase Order

## Purchase Order

Business Unit: 0840  
 PO ID: NEXT  
 Copy From:

PO Status: Initial   
 Budget Status: Not Chk'd  
☐ Hold From Further Processing ☐ Dispute [Enter dispute information](#) [Activity Log](#)

---

**Header**

PO Date: 02/02/2015 [Vendor Search](#)  
 Vendor:  [Vendor Details](#)  
 Vendor ID:    
 Buyer: 10000087 John Tugade  
 PO Reference:   
☐ Leased ☐ Financed  
 AA Number: 0840\_000001  
[Header Details](#) [Activity Summary](#)  
[PO Defaults](#)  
[PO Activities](#) [Add ShipTo Comments](#) [Reportable Attachment](#)  
[B/DVBE Contracting](#) [Confidential](#)

Doc Tol Status: Valid  
 \*Acquisition Type:    
 \*Acquisition Method:    
 \*DGS Billing Code:  IBond:    
 Receipt Status: Not Recvd  
 \*Dispatch Method:  [Dispatch](#)

---

**Amount Summary**

Merchandise: 0.00  
 Freight/Tax/Misc.: 0.00 [Calculate](#)  
 Total Amount: 0.00 USD

---

**Add Items From**

[Purchasing Kit](#) [Catalog](#) [Item Search](#)

---

**Lines**

[Personalize](#) | [Find](#) | [View All](#) | First 1 of 1 Last


Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving	SABRC/EPP
Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	0.000	Approved	

[View Printable Version](#) [Close Short All Lines](#) \*Go to:  [... More ...](#)

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

# Wave 2 Demo – Create PO, Copy from Requisition

[Favorites](#) > [Main Menu](#) > [eProcurement](#) > [Buyer Center](#) > [Manage Purchase Orders](#) > [Add/Update POs](#)



[Maintain Purchase Order](#)

## Copy Purchase Order from Requisition

[Return to Main Page](#)

Requisition Selection Criteria

Business Unit:

0840

Vendor ID:

Category:

Requisition ID:

0000000012

Requisition Name:

Contract ID:

Search

Buyer:

Origin:

Max Rows:

20

☒ Include Reqs With No Vendor

☒ Include Inventory Items

☐ Exclude Auto Source Item

Select Requisition Lines

[Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#)

First

1 of 1

Last

Sourcing

Requisitions

Contract Information

Select	Vendor	PO Qty	PO UOM	Item	Description	Req ID	Procurement Card	Calc Price	Schedule Split
<input type="checkbox"/>		1.0000	EA		Test 1	0000000012	1	N	

☒ Select All
 ☐ Clear All

Copy To PO

Save

Notify


Refresh

Add

Update/Display

# Wave 2 Demo – Create PO, Header and Footer

[Favorites](#)
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[eProcurement](#)
[Buyer Center](#)
[Manage Purchase Orders](#)
[Add/Update POs](#)



Maintain Purchase Order

Purchase Order

Business Unit: 0840  
PO ID: 0000000647

PO Status: Open  
Budget Status: Not Chk'd

Copy From: 
☐ Hold From Further Processing
☐ Dispute
[Enter dispute information](#)
[Activity Log](#)

Header

\*PO Date: 02/02/2015  
\*Vendor: ABLEINC-001  
\*Vendor ID: 0000000002  
\*Buyer: 10000087  
PO Reference:   
☐ Leased ☐ Financed  
PAA Number: 0840\_000001  
Header Details  
PO Defaults  
PO Activities  
SB/DVBE Contracting

[Vendor Search](#)  
[Vendor Details](#)  
ABLE INC  
John Tugade

Doc Tol Status: Valid  
\*Acquisition Type: NON-IT Goods  
\*Acquisition Method: Fair and Reas  
\*DGS Billing Code: DEPT010000  
Receipt Status: Not Recvd  
\*Dispatch Method: Print  
Exemption code:   
IBond:

[Add Comments](#)  
[Add ShipTo Comments](#)  
[Reportable Attachment](#)  
Confidential

Amount Summary  
Merchandise: 6,300.00  
Freight/Tax/Misc.: 0.00  
Total Amount: 6,300.00 USD

Add Items From  
Purchasing Kit Catalog Item Search

Lines

[Details](#)
[Ship To/Due Date](#)
[Statuses](#)
[Item Information](#)
[Attributes](#)
[RFQ](#)
[Contract](#)
[Receiving](#)
[SABRC/EPP](#)

Personalize | Find | View All | First 1 of 1 Last


Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		Standby Generator -	3.0000	EA	41113655	2100.00000	6,300.00	Approved			

[View Printable Version](#)

\*Go to:  More ...

# Wave 2 Demo – Create PO , Schedule Info

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[eProcurement](#)
[Buyer Center](#)
[Manage Purchase Orders](#)
[Add/Update POs](#)



Maintain Purchase Order

Schedules

Unit: 0840 Vendor: ABLEINC-001 PO Status: Open  
PO ID: NEXT PO Date: 02/02/2015

[Return to Main Page](#)

Lines

Find | View All First 1 of 1 Last

Line: 1 Item: Standby Generator - Automatic 10 HP PO Qty: 3.0000 EA Merchandise Amt: 6,300.00 USD

Schedules

Personalize | Find | View All | First 1 of 1 Last

[Details](#)
[Statuses](#)
[Shipment](#)
[Matching](#)
[Receiving](#)
[Freight](#)
[RTV](#)

Sched	*Due Date	*Ship To	Ship to GLN	*PO Qty	Price	Merchandise Amount	Status					
1	02/02/2015	0840000002		3.0000	2,100.00000	6,300.00	Active					


Add ShipTo Comments

Save Notify Refresh

Add Update/Display

# Wave 2 Demo – Create PO, Funding (Distribution)

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[Buyer Center](#)
[Manage Purchase Orders](#)
[Add/Update POs](#)



## Maintain Purchase Order

### Purchase Order

Business Unit: 0840  
PO ID: 0000000647

PO Status: Open  
Budget Status: Not Chk'd

Copy From: 
☐ Hold From Further Processing
☐ Dispute
[Enter dispute information](#)
[Activity Log](#)

\*PO Date: 02/02/2015
\*Vendor: ABLEINC-001
\*Vendor ID: 0000000002
\*Buyer: 10000087

Vendor Search  
Vendor Details  
ABLE INC  
John Tugade

Doc Tol Status: Valid
\*Acquisition Type: NON-IT Goods
\*Acquisition Method: Fair and Reas
\*DGS Billing Code: DEPT010000

Exemption code: 
IBond:

PO Reference: 
Leased ☐
Financed ☐

PAA Number: 0840\_000001
Header Details
Activity Summary

PO Defaults

PO Activities
SB/DVBE Contracting

Add Comments
Add ShipTo Comments
Reportable Attachment


Amount Summary

Merchandise: 6,300.00
Freight/Tax/Misc.: 0.00
Total Amount: 6,300.00 USD

Add Items From
Purchasing Kit
Catalog
Item Search

Details
Ship To/Due Date
Statuses
Item Information
Attributes
RFQ
Contract
Receiving
SABRC/EPP

Personalize
Find
View All
First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Standby Generator -	3.0000	EA	41113655	2100.00000	6,300.00	Approved

[View Printable Version](#)
[Close Short All Lines](#)
\*Go to:


February 17, 2015

FI\$Cal: Transparency. Accuracy. Integrity.

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# Wave 2 Demo– Event Creation

[Favorites](#)
[Main Menu](#)
[Sourcing](#)
[Create Events](#)
[Event Details](#)



[Create an Event](#)

## Event Summary

Business Unit: 0840    Event ID: NEXT    Round: 1    Version: 1    Event Format: Buy

Event Type: RFx    [Change to Auction](#)

☐ On Hold due to Protest    [Enter Protest Information](#)    [Activity Log](#)

Event Status: Open

\*Event Name:

Description:

Exemption code:

Number of Days:     ☐ Intend to Award

Time Zone: PST

Preview Date: 02/02/2015    Time: 5:32PM

Start Date: 02/02/2015    Time: 5:32PM

End Date: 02/02/2015    Time: 5:32PM

Copy From:     [Go](#)

\*Acquisition Type:

\*Acquisition Method:

\*DGS Billing Code:

IBond:

☐ Two Envelope

Required fields reside on pages marked with an asterisk (\*) -- you may not save your event until all required fields are filled.

### Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[\\* Event Settings and Options](#)

[Reportable Attachment](#)

[Payment Terms and Contact Info](#)

[Event Comments and Attachments](#)


[Event Constraints](#)

[Event Header Bid Factors](#)

[Confidential](#)

# Wave 2 Demo– Event Creation, Copy from Req

Favorites
Main Menu
> Sourcing
> Create Events
> Event Details



Create an Event

Enter Copy Criteria

Copy Template

Copy From: Requisition

Select Criteria

Business Unit:
\*Copy Method: Append
\*Select Lines: RFQ Required

Copy Criteria


Requisition ID:
Buyer:
SetID:
Category:
Vendor SetID:
Item ID:
Vendor ID:

☐ Exclude Auto Source Item
☐ Include Inventory Items
☐ Stockless Item
☐ Include Reqs With No Vendor
☐ Copy all Req/RFQ lines

OK
Cancel
Refresh

# Wave 2 Demo– Event Creation, Event Header

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[Event Details](#)



Create an Event

Enter Copy Criteria

Business Unit: 0840
Event ID: NEXT
Round: 1
Version: 1
Event Format: Buy

Event Type: RFx
[Change to Auction](#)

☐ On Hold due to Protest
[Enter Protest Information](#)
[Activity Log](#)

Event Status: Open

\*Event Name: Back up Generators for Offices

Description:

Exemption code:

Number of Days:

☐ Intend to Award

Time Zone: PST

Preview Date: 02/02/2015
Time: 3:09PM

Start Date: 02/02/2015
Time: 3:09PM

End Date: 04/30/2015
Time: 3:09PM

Copy From: Requisition
[Go](#)

\*Acquisition Type: NON-IT Goods

\*Acquisition Method: Fair and Reasonable

\*DGS Billing Code: PL00000000005548

IBond:

☐ Two Envelope

Required fields reside on pages marked with an asterisk (\*) – you may not save your event until all required fields are filled.

**Step 1: Define Event Basics**

Enter basic information, general settings and optional rules for this event.

\* Event Settings and Options
Event Comments and Attachments
Event Header Bid Factors

Reportable Attachment


Payment Terms and Contact Info
Event Constraints
Confidential

**Step 2: Configure Line Items**

Create line listings for this event

# Wave 2 Demo– Event Creation, Step 2: Line Items

[Favorites](#) > [Main Menu](#) > [Sourcing](#) > [Create Events](#) > [Event Details](#)



[Create an Event](#)

## Line Items

**Business Unit:** 0840    **Event ID:** NEXT    **Round:** 1    **Version:** 1    **Event Format:** Buy    **Event Type:** RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

**Copy From:**  
**Filtered View:**

[Line Items](#)

[Personalize](#) | [Find](#) | [View All](#) | |    First 1 of 1 Last

[Basic Definition](#)
[Advanced Definition](#)

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	<input type="text"/>	Back Generator - Automated 10 HP	41113655	EA	3.0000	2000		0.00000

**Event Total: 0.0000 USD**
**Line Weighting Total: 0 %    Remaining Weight: 100 %**


**Add Selected Lines to Group:**

[< Return to Event Overview](#)

**GoTo:**

# Wave 2 Demo—Event Creation, Step 3: Invite Bidders

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[Create an Event](#)

## Invite Bidders

Business Unit: 0840    Event ID: NEXT    Round: 1    Version: 1    Event Format: Buy    Event Type: RFx

☐ Public Event    ☐ Post To CSCR

Bidder Invitation List
 [Personalize](#) | [Find](#) | [View All](#) | |

First 1 of 1 Last

	Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method		
1						Email		


[Search for Bidders](#)    [Dispatch Lines](#)    [Save Bidders as Group](#)

GoTo:

[< Return to Event Overview](#)

# Wave 2 Demo—Event Creation, Bidder Search

Favorites ▾ Main Menu ▾ > Sourcing ▾ > Create Events ▾ > Event Details



## Bidder Search

Search Criteria

Bidder Type: Vendor ▾

Name:  🔍

ID:  🔍

Contact:  🔍

Group ID:  🔍

Group Name:  🔍

State: CA 🔍

City: Sacramento

Country:  🔍

Postal:

Type:  ▾

SIC Type:  🔍

SIC Code:  🔍

Item ID:  🔍

Optional Organization Criteria

Results Option: Display Bidder/Company Id Only ▾

Type:  ▾

Search Recommend Bidders

Maximum Rows retrieved: 50

Select All Deselect All

Search Results

Personalize | Find | View All | 📄 📅


First 1-6 of 6 Last

Bidder ID	Location	Bidder Company	Invite
1 0000010654	LOCATION1 🔍	Joan	<input checked="" type="checkbox"/>
2 0000010656	LOCATION2 🔍	Harriot	<input checked="" type="checkbox"/>
3 0000010657	LOC1 🔍	Joseph	<input checked="" type="checkbox"/>
4 0000010662	MAIN 🔍	Accenture	<input checked="" type="checkbox"/>
5 EMP1081842	HQ 🔍	NANCY CRAIG	<input checked="" type="checkbox"/>
6 EMP1256347	OFFICE 🔍	MARK NEUBURGER	<input checked="" type="checkbox"/>

OK Cancel Refresh

# Wave 2 Demo–Event Creation, Public/Post to CSCR

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Create an Event

Invite Bidders

Business Unit: 0840
Event ID: NEXT
Round: 1
Version: 1
Event Format: Buy
Event Type: RFx

☒ Public Event
☒ Post To CSCR

Bidder Invitation List

[Personalize](#)
[Find](#)
[View All](#)
[Print](#)
[Calendar](#)
First 1-5 of 7 Last

	Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method		
1	<input type="checkbox"/>	PUBLIC_AUC	Public	1	This is a Public Event	Email		
2	<input type="checkbox"/>	0000010654	Vendor	LOCATION1	Joan	Email		
3	<input type="checkbox"/>	0000010656	Vendor	LOCATION2	Harriot	Email		
4	<input type="checkbox"/>	0000010657	Vendor	LOC1	Joseph	Email		
5	<input type="checkbox"/>	0000010662	Vendor	MAIN	Accenture	Email		

[Search for Bidders](#)
[Dispatch Lines](#)
[Save Bidders as Group](#)

Save Event Changes

GoTo:  Go

[Return to Event Overview](#)

Refresh

Add Update/Display

# Wave 2 Demo–Event Creation, Event Saved

[Favorites](#) > [Main Menu](#) > [Sourcing](#) > [Create Events](#) > [Event Details](#)

**FI\$Cal**

Create an Event

**Event Summary**

Business Unit: 0840    Event ID: 0000000364    Round: 1    Version: 1    Event Format: Buy

---

Event Type: RFX [Change to Auction](#)

Event Status: Open

\*Event Name: Back up Generators for Offices

Description:

☐ On Hold due to Protest [Enter Protest Information](#) [Activity Log](#)

Exemption code:

Number of Days:  ☐ Intend to Award

Time Zone: PST

Preview Date: 02/02/2015  Time: 3:09PM

Start Date: 02/02/2015  Time: 3:09PM

End Date: 04/30/2015  Time: 3:09PM

Copy From: Requisition

---

\*Acquisition Type: NON-IT Goods

\*Acquisition Method: Fair and Reasonable

\*DGS Billing Code: PL0000000005548  ☐ Two Envelope

IBond:

Required fields reside on pages marked with an asterisk (\*) – you may not save your event until all required fields are filled.

**Step 1: Define Event Basics**

Enter basic information, general settings and optional rules for this event.


[\\* Event Settings and Options](#)    [Reportable Attachment](#)    [Payment Terms and Contact Info](#)  
[Event Comments and Attachments](#)    [Event Constraints](#)  
[Event Header Bid Factors](#)    [Confidential](#)

**Step 2: Configure Line Items**

Create line listings for this event

# Wave 2 Demo—Event Creation, Contract Entry

[Favorites](#)
[Main Menu](#)
[Procurement Contracts](#)
[Add/Update Contracts](#)



Contract Entry

Contract

SetID:  
Contract ID:  
\*Status:

STATE  
NEXT  
Open

Copy From Contract  
View Approvals

Contract Version  
Version: 1  
Status: Current  
Approval Due Date:  
Contract Reference:

New Version  
Submit for Approval

Administrator/Buyer:

Leased  
Financed  
Add a Document

Header

Add Comments

Process Option:  
\*Acquisition Type:  
\*Acquisition Method:  
DGS Billing Code:

Purchase Order

Vendor:  
\*Vendor ID:  
\*Begin Date:  
Expire Date:  
Renewal Date:  
Currency:  
Primary Contact:  
Vendor Contract Ref:  
Description:  
Master Contract ID:  
☐ Tax Exempt  
Exemption code:

02/02/2015  
  
  
USD

Vendor Search

IBond:  
Contract Activities  
Primary Contact Info  
Contract Header Agreement  
Contract Releases

Document Status  
Thresholds & Notifications  
Reportable Attachment  
Agreement Summary

Confidential  
Maximum Amount:

0.00

USD

Amount Summary

Line Item Released Amount:	0.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	0.00

# Wave 2 Demo—Event Creation, Contract Saved

[illegible]